

Draft Summary from November 10, 2005 ORD Products Workshop

Lessons from Success Stories and Afternoon Discussion

Design and Development

- Have clear objectives
- Need partners/collaborators from all sectors (fed, industry, state & local, academia, NGOs)
- Need commitment and continuous involvement of stakeholders
- Important to interact with Regions in assessing proposals and in project design
- Need a champion

Deployment – Marketing

- OMB/PART process drives some of the pressure to “market”
 - results-oriented approaches
 - need to demonstrate direct links between science products or expertise and environmental results
- Communicate a clear message about product benefits and/or results
- Take advantage of existing “sales staff”- RSLs (Regional Science Liaisons); satisfied customers in Regions, states, and tribes; experts (brings credibility)
- Networking is critical – RSLs can assist in making initial connections; also use other Regional contacts (e.g., National Regional Science Council, Lead Region Coordinators, existing EPA workgroups, Regions’ national experts, etc.)
- Develop a strategic approach to marketing
 - Conduct market research to:
 - understand customer needs and culture in order to focus marketing efforts
 - evaluate marketing strategy and progress regularly
 - Learn more about customers
 - identify key customers’ needs and culture
 - Regions and ORD can share their knowledge of customers (e.g., state agencies, stakeholder groups, specific clean-up sites)
 - build customer relationships
 - consider federal and state agencies, tribes, and stakeholders as part of “customer base”
 - Develop a clear, long-term strategy for maintaining customer relations and communications
 - Identify a champion and/or a marketing team – aggressive sales person(s) and/or satisfied customer
 - Differentiate markets
 - Include Regions, but also surrounding or affected communities
 - Consider, as part of marketing strategy, how to use tool or product now and how to modify it for other applications
 - Markets will change over time – marketing strategies need to change, too
 - Focus first on high-visibility topics: human health, kids, Regions’ priorities
 - Develop an outreach strategy for ORD products
 - Generate a list of “final” ORD products and expertise
 - Outreach approaches:
 - Engage Regions and/or stakeholders in developing case-studies
 - Present research products at workshops, conferences/seminars, roundtables
 - Populate and market through websites - downloadable documents

- Communicate favorable independent reviews, and feedback or testimonials from satisfied customers (obtain by conducting market research)
- Use existing inter/intra-agency workgroups (e.g., Regional Risk Assessors, Engineering Forum, Groundwater Forum, etc.)
- Through public education (e.g., Hg quiz)
- Regions can disseminate information
- Continue outreach as science changes
- Evaluate the relative efficacy of the broadcast vs contagion model for types of products or expertise
- Seek access to multiple media (e.g., internet, intranet, radio, local television, print, industry publications, etc.)
- Use marketing research tools (e.g., direct marketing tracking software for websites) to feedback into marketing strategy and modify, based on results

Deployment – Support & Maintenance

- Establish maintenance plan at outset
- Need resources
 - long-term management support
 - Impact – did product make a difference?
 - Measuring and documenting customer interest, uses and realized benefits
 - User fees?
 - Partnering within and outside Agency
 - Building capacity
 - In user organizations
 - Scientist-to-scientist mentoring
 - Modeling Support Center (contagion marketing model)
- Building the ORD/Region partnership.
 - Keeping the dialog going.
 - Help Regions develop stronger project proposals
 - Help ORD build better customer interfaces
- “Product development” is not an ORD priority - may need external partnerships to:
 - Transfer to the market - create better customer interfaces
 - Tailor to different market needs
 - Provide support/training to an expanding market base.
- Need high-level conversation between ORD and Regions to increase importance to ORD of maintenance and support. Need to bring EPA into dialog.

Deployment – Feedback & Tracking

- Getting Feedback on products
 - Regions can provide helpful feedback. Also need to identify who, in Regions, can make model work
 - Networking is a good source of feedback
 - Continued contact with clients
 - From potential users
 - From collaborators (contractors, universities, state/local agencies, industry)
 - External peer reviews
 - Hold workshops
 - SAB

- Form cross-organizational workgroups (ORD, Program Offices and Regions)
- Tracking
 - Accountability Program (Rebecca) – developing tools and methods to document public health benefits
 - ORD needs to keep Regions informed about status of projects in ORD’s “hopper.”

Proposed Next Steps

- Establish and grow workshop workgroup(s). Volunteers:
 - Candida West
 - Laura Jackson
 - Aron Furster (Communications – interface issues)
 - Melissa Anley-Mills (Communications – interface issues)
 - Rebecca Calderon (Speakers Bureau)
 - Bob Hetes (interaction point with RSLs)
 - Sue Thornloe (measuring outcomes on tools)
- Develop list of “Finished” ORD products to market.
 - Include “beta products” that can benefit from community input.
 - Pat Burke will send info. on published products to Regions
- Establish regular dialogs and build the network
 - Distribute a calendar of planned conference calls; provide e-mail reminders
 - Monthly RSL calls – announce focal topic in e-mail reminder
 - Research program calls (e.g., Dan Costa’s PM calls)
 - MYP team calls
 - Promote successes – announcements (AA newsletter, own newsletter)
 - Promote mutual education
 - ORD investigators can review Region websites (Strategic Plans)
 - RSLs can look at Science Portal, use Northern Light search engine
 - One-to-one calls – investigators and RSLs
 - Establish ORD Speakers Bureau
 - Rotate meetings so not predominantly on East coast.
 - Expand network to public, academic community (Extension and Communication model)
 - Move ORD Regional Science Program representative(s) to field
 - Create a list-serve
- Promote ORD/Region complementarity
 - Region input on ORD long-term planning (what are the emerging needs), and in designing product pipeline
 - ORD expertise on short-term Regional issues (not to necessarily generate data, but describe state-of-science, connect to scientist networks)
 - Leverage points of contact to connect networks
 - for ORD: ALDs/RCTs, NPDs, Program Coordinators, Science Regulatory Coordinators
 - for Regions: RSLs, Regional Risk Assessors, Hazardous Substance Technology Liaisons
 - Leverage resources
 - Regions to pool \$ and/or fractions of FTE
 - ORD to assist Regions in submitting funding proposals
 - ORD investigators to spend 1-2 weeks in Regions promoting product
 - Talk with clients to develop RFAs
 - Regions to commit to building own expertise
 - ORD Science Communication Team to help with interface issues and to network (need “elevator speeches”)
 - Promote release of “beta” versions for collaborative development with customers
 - Detail Regional people to ORD and vice versa